Everyday Math
Activity #12: Filling Out Your Taxes

Use the W-2 form, the 1040EZ form and the Tax Table to determine
the amount of your refund or the amount you owe. For the purpose
of this activity assume you are filing as a single person and that no one
can claim you as a dependent.

Form
W - 2   2001

Control number			For Official Use Only OMB No. 1545-008	
11 Employer's identification number			**1 Wage, tips….** 24,893	**2 Fed. tax w/held** 3,567
12 Employer's name, address, and ZIP			**3 Soc. sec. wages**	**4 Soc. Sec. tax**
			5 Medicare wages	**6 Medicare tax**
			7 Soc. Sec. tips	**8 Allocated tips**
13 Employee's social security number				**9 Dependent care**
14 Employee's name (first, middle, last)				
15 Employee's address and ZIP				**10 Other**

Department of the Treasury—Internal Revenue Service

Form 1040EZ

Income Tax Return for Single and Joint Filers With No Dependents (99) 2001

OMB No. 1545-0675

Label
(See page 12.)
Use the IRS label.
Otherwise, please print or type.

L A B E L   H E R E

Your first name and initial | Last name

Your social security number

If a joint return, spouse's first name and initial | Last name

Spouse's social security number

Home address (number and street). If you have a P.O. box, see page 12. | Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, see page 12.

▲ **Important!** ▲
You **must** enter your SSN(s) above.

Presidential Election Campaign
(page 12)

Note. Checking "Yes" will not change your tax or reduce your refund.
Do you, or spouse if a joint return, want $3 to go to this fund? . . . . ▶

	You	Spouse
	☐ Yes ☐ No	☐ Yes ☐ No

Income

Attach Form(s) W-2 here.
Enclose, but do not attach, any payment.

1 Total wages, salaries, and tips. This should be shown in box 1 of your W-2 form(s). Attach your W-2 form(s). — 1

2 Taxable interest. If the total is over $400, you cannot use Form 1040EZ. — 2

3 Unemployment compensation, qualified state tuition program earnings, and Alaska Permanent Fund dividends (see page 14). — 3

4 Add lines 1, 2, and 3. This is your **adjusted gross income.** — 4

Note. You **must** check Yes or No.

5 Can your parents (or someone else) claim you on their return?
Yes. Enter amount from worksheet on back. ☐
No. If **single,** enter 7,450.00. If **married,** enter 13,400.00. See back for explanation. ☐ — 5

6 Subtract line 5 from line 4. If line 5 is larger than line 4, enter 0. This is your **taxable income.** ▶ 6

Credits, payments, and tax

7 Rate reduction credit. See the worksheet on page 14. — 7

8 Enter your Federal income tax withheld from box 2 of your W-2 form(s). — 8

9a **Earned income credit (EIC).** See page 15. — 9a

b Nontaxable earned income. — 9b

10 Add lines 7, 8, and 9a. These are your **total credits and payments.** ▶ 10

11 **Tax.** If you checked "Yes" on line 5, see page 20. Otherwise, use the amount on **line 6 above** to find your tax in the tax table on pages 24–28 of the booklet. Then, enter the tax from the table on this line. — 11

Refund

Have it directly deposited! See page 20 and fill in 12b, 12c, and 12d.

12a If line 10 is larger than line 11, subtract line 11 from line 10. This is your **refund.** ▶ 12a

▶ **b** Routing number

▶ **c** Type: ☐ Checking ☐ Savings

▶ **d** Account number

Amount you owe

13 If line 11 is larger than line 10, subtract line 10 from line 11. This is the **amount you owe.** See page 21 for details on how to pay. ▶ 13

Third party designee

Do you want to allow another person to discuss this return with the IRS (see page 22)? ☐ **Yes.** Complete the following. ☐ **No**

Designee's name ▶

Phone no. ▶ ( )

Personal identification number (PIN) ▶

Sign here

Under penalties of perjury, I declare that I have examined this return, and to the best of my knowledge and belief, it is true, correct, and accurately lists all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.

Joint return? See page 11.
Keep a copy for your records.

Your signature | Date | Your occupation | Daytime phone number ( )

Spouse's signature. If a joint return, **both** must sign. | Date | Spouse's occupation

Paid preparer's use only

Preparer's signature ▶ | Date | Check if self-employed ☐ | Preparer's SSN or PTIN

Firm's name (or yours if self-employed), address, and ZIP code ▶ | EIN | Phone no. ( )

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 23.

Cat. No. 11329W

Form **1040EZ** (2001)

2001 Tax Table

14,000 – 16,999

At least	But less than	Single	Married filing jointly *	Married filing separately	Head of a household
14,000					
14,000	14,050	2,104	2,104	2,104	2,104
14,050	14,100	2,111	2,111	2,111	2,111
14,100	14,150	2,119	2,119	2,119	2,119
14,150	14,200	2,126	2,126	2,126	2,126
14,200	14,250	2,134	2,134	2,134	2,134
14,250	14,300	2,141	2,141	2,141	2,141
14,300	14,350	2,149	2,149	2,149	2,149
14,350	14,400	2,156	2,156	2,156	2,156
14,400	14,450	2,164	2,164	2,164	2,164
14,450	14,500	2,171	2,171	2,171	2,171
14,500	14,550	2,179	2,179	2,179	2,179
14,550	14,600	2,186	2,186	2,186	2,186
14,600	14,650	2,194	2,194	2,194	2,194
14,650	14,700	2,201	2,201	2,201	2,201
14,700	14,750	2,209	2,209	2,209	2,209
14,750	14,800	2,216	2,216	2,216	2,216
14,800	14,850	2,224	2,224	2,224	2,224
14,850	14,900	2,231	2,231	2,231	2,231
14,900	14,950	2,239	2,239	2,239	2,239
14,950	15,000	2,246	2,246	2,246	2,246
15,000					
15,000	15,050	2,254	2,254	2,254	2,254
15,050	15,100	2,261	2,261	2,261	2,261
15,100	15,150	2,269	2,269	2,269	2,269
15,150	15,200	2,276	2,276	2,276	2,276
15,200	15,250	2,284	2,284	2,284	2,284
15,250	15,300	2,291	2,291	2,291	2,291
15,300	15,350	2,299	2,299	2,299	2,299
15,350	15,400	2,306	2,306	2,306	2,306
15,400	15,450	2,314	2,314	2,314	2,314
15,450	15,500	2,321	2,321	2,321	2,321
15,500	15,550	2,329	2,329	2,329	2,329
15,550	15,600	2,336	2,336	2,336	2,336
15,600	15,650	2,344	2,344	2,344	2,344
15,650	15,700	2,351	2,351	2,351	2,351
15,700	15,750	2,359	2,359	2,359	2,359
15,750	15,800	2,366	2,366	2,366	2,366
15,800	15,850	2,374	2,374	2,374	2,374
15,850	15,900	2,381	2,381	2,381	2,381
15,900	15,950	2,389	2,389	2,389	2,389
15,950	16,000	2,396	2,396	2,396	2,396
16,000					
16,000	16,050	2,404	2,404	2,404	2,404
16,050	16,100	2,411	2,411	2,411	2,411
16,100	16,150	2,419	2,419	2,419	2,419
16,150	16,200	2,426	2,426	2,426	2,426
16,200	16,250	2,434	2,434	2,434	2,434
16,250	16,300	2,441	2,441	2,441	2,441
16,300	16,350	2,449	2,449	2,449	2,449
16,350	16,400	2,456	2,456	2,456	2,456
16,400	16,450	2,464	2,464	2,464	2,464
16,450	16,500	2,471	2,471	2,471	2,471
16,500	16,550	2,479	2,479	2,479	2,479
16,550	16,600	2,486	2,486	2,486	2,486
16,600	16,650	2,494	2,494	2,494	2,494
16,650	16,700	2,501	2,501	2,501	2,501
16,700	16,750	2,509	2,509	2,509	2,509
16,750	16,800	2,516	2,516	2,516	2,516
16,800	16,850	2,524	2,524	2,524	2,524
16,850	16,900	2,531	2,531	2,531	2,531
16,900	16,950	2,539	2,539	2,539	2,539
16,950	17,000	2,546	2,546	2,546	2,546

17,000 – 19,999

At least	But less than	Single	Married filing jointly *	Married filing separately	Head of a household
17,000					
17,000	17,050	2,554	2,554	2,554	2,554
17,050	17,100	2,561	2,561	2,561	2,561
17,100	17,150	2,569	2,569	2,569	2,569
17,150	17,200	2,576	2,576	2,576	2,576
17,200	17,250	2,584	2,584	2,584	2,584
17,250	17,300	2,591	2,591	2,591	2,591
17,300	17,350	2,599	2,599	2,599	2,599
17,350	17,400	2,606	2,606	2,606	2,606
17,400	17,450	2,614	2,614	2,614	2,614
17,450	17,500	2,621	2,621	2,621	2,621
17,500	17,550	2,629	2,629	2,629	2,629
17,550	17,600	2,636	2,636	2,636	2,636
17,600	17,650	2,644	2,644	2,644	2,644
17,650	17,700	2,651	2,651	2,651	2,651
17,700	17,750	2,659	2,659	2,659	2,659
17,750	17,800	2,666	2,666	2,666	2,666
17,800	17,850	2,674	2,674	2,674	2,674
17,850	17,900	2,681	2,681	2,681	2,681
17,900	17,950	2,689	2,689	2,689	2,689
17,950	18,000	2,696	2,696	2,696	2,696
18,000					
18,000	18,050	2,704	2,704	2,704	2,704
18,050	18,100	2,711	2,711	2,711	2,711
18,100	18,150	2,719	2,719	2,719	2,719
18,150	18,200	2,726	2,726	2,726	2,726
18,200	18,250	2,734	2,734	2,734	2,734
18,250	18,300	2,741	2,741	2,741	2,741
18,300	18,350	2,749	2,749	2,749	2,749
18,350	18,400	2,756	2,756	2,756	2,756
18,400	18,450	2,764	2,764	2,764	2,764
18,450	18,500	2,771	2,771	2,771	2,771
18,500	18,550	2,779	2,779	2,779	2,779
18,550	18,600	2,786	2,786	2,786	2,786
18,600	18,650	2,794	2,794	2,794	2,794
18,650	18,700	2,801	2,801	2,801	2,801
18,700	18,750	2,809	2,809	2,809	2,809
18,750	18,800	2,816	2,816	2,816	2,816
18,800	18,850	2,824	2,824	2,824	2,824
18,850	18,900	2,831	2,831	2,831	2,831
18,900	18,950	2,839	2,839	2,839	2,839
18,950	19,000	2,846	2,846	2,846	2,846
19,000					
19,000	19,050	2,854	2,854	2,854	2,854
19,050	19,100	2,861	2,861	2,861	2,861
19,100	19,150	2,869	2,869	2,869	2,869
19,150	19,200	2,876	2,876	2,876	2,876
19,200	19,250	2,884	2,884	2,884	2,884
19,250	19,300	2,891	2,891	2,891	2,891
19,300	19,350	2,899	2,899	2,899	2,899
19,350	19,400	2,906	2,906	2,906	2,906
19,400	19,450	2,914	2,914	2,914	2,914
19,450	19,500	2,921	2,921	2,921	2,921
19,500	19,550	2,929	2,929	2,929	2,929
19,550	19,600	2,936	2,936	2,936	2,936
19,600	19,650	2,944	2,944	2,944	2,944
19,650	19,700	2,951	2,951	2,951	2,951
19,700	19,750	2,959	2,959	2,959	2,959
19,750	19,800	2,966	2,966	2,966	2,966
19,800	19,850	2,974	2,974	2,974	2,974
19,850	19,900	2,981	2,981	2,981	2,981
19,900	19,950	2,989	2,989	2,989	2,989
19,950	20,000	2,996	2,996	2,996	2,996

20,000 – 22,999

At least	But less than	Single	Married filing jointly *	Married filing separately	Head of a household
20,000					
20,000	20,050	3,004	3,004	3,004	3,004
20,050	20,100	3,011	3,011	3,011	3,011
20,100	20,150	3,019	3,019	3,019	3,019
20,150	20,200	3,026	3,026	3,026	3,026
20,200	20,250	3,034	3,034	3,034	3,034
20,250	20,300	3,041	3,041	3,041	3,041
20,300	20,350	3,049	3,049	3,049	3,049
20,350	20,400	3,056	3,056	3,056	3,056
20,400	20,450	3,064	3,064	3,064	3,064
20,450	20,500	3,071	3,071	3,071	3,071
20,500	20,550	3,079	3,079	3,079	3,079
20,550	20,600	3,086	3,086	3,086	3,086
20,600	20,650	3,094	3,094	3,094	3,094
20,650	20,700	3,101	3,101	3,101	3,101
20,700	20,750	3,109	3,109	3,109	3,109
20,750	20,800	3,116	3,116	3,116	3,116
20,800	20,850	3,124	3,124	3,124	3,124
20,850	20,900	3,131	3,131	3,131	3,131
20,900	20,950	3,139	3,139	3,139	3,139
20,950	21,000	3,146	3,146	3,146	3,146
21,000					
21,000	21,050	3,154	3,154	3,154	3,154
21,050	21,100	3,161	3,161	3,161	3,161
21,100	21,150	3,169	3,169	3,169	3,169
21,150	21,200	3,176	3,176	3,176	3,176
21,200	21,250	3,184	3,184	3,184	3,184
21,250	21,300	3,191	3,191	3,191	3,191
21,300	21,350	3,199	3,199	3,199	3,199
21,350	21,400	3,206	3,206	3,206	3,206
21,400	21,450	3,214	3,214	3,214	3,214
21,450	21,500	3,221	3,221	3,221	3,221
21,500	21,550	3,229	3,229	3,229	3,229
21,550	21,600	3,236	3,236	3,236	3,236
21,600	21,650	3,244	3,244	3,244	3,244
21,650	21,700	3,251	3,251	3,251	3,251
21,700	21,750	3,259	3,259	3,259	3,259
21,750	21,800	3,266	3,266	3,266	3,266
21,800	21,850	3,274	3,274	3,274	3,274
21,850	21,900	3,281	3,281	3,281	3,281
21,900	21,950	3,289	3,289	3,289	3,289
21,950	22,000	3,296	3,296	3,296	3,296
22,000					
22,000	22,050	3,304	3,304	3,304	3,304
22,050	22,100	3,311	3,311	3,311	3,311
22,100	22,150	3,319	3,319	3,319	3,319
22,150	22,200	3,326	3,326	3,326	3,326
22,200	22,250	3,334	3,334	3,334	3,334
22,250	22,300	3,341	3,341	3,341	3,341
22,300	22,350	3,349	3,349	3,349	3,349
22,350	22,400	3,356	3,356	3,356	3,356
22,400	22,450	3,364	3,364	3,364	3,364
22,450	22,500	3,371	3,371	3,371	3,371
22,500	22,550	3,379	3,379	3,379	3,379
22,550	22,600	3,386	3,386	3,386	3,386
22,600	22,650	3,394	3,394	3,397	3,394
22,650	22,700	3,401	3,401	3,411	3,401
22,700	22,750	3,409	3,409	3,424	3,409
22,750	22,800	3,416	3,416	3,438	3,416
22,800	22,850	3,424	3,424	3,452	3,424
22,850	22,900	3,431	3,431	3,466	3,431
22,900	22,950	3,439	3,439	3,479	3,439
22,950	23,000	3,446	3,446	3,493	3,446